

Working with Summaries in MAXQDA

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Summaries in MAXQDA allow you to work at a more abstract level by summarising data segments that have already been coded and then view, display and analyse your summaries. They can be useful for many different purposes. The MAXQDA Help Menu provides additional information about the idea behind Summaries, as well as instructions for generating and working with them.

<https://www.maxqda.com/help-mx20/summary-grid/idea-behind-summary-grid>

Summary features in MAXQDA



- Summary Grid – allows you to summarise coded-segments in a grid display
- Summary Tables – allow you to display your summaries together with Variables
- Summary Explorer – allows you to compare summaries according to cases or groups
- Overviews of Summaries – allows you to retrieve summaries you have written from different levels within the Document System

Working with Summary Grids

Clicking on the Summary Grid button (in the Analysis Menu) opens the Grid which displays all Codes in rows, and all Documents in Columns (Figure 1). The blue squares in the Grid indicate the presence of coded segments for each Document/Code intersection. Clicking on a blue square displays those coded segments in the middle panel. The right-hand panel is the place where you can write your summary of the displayed coded segments.

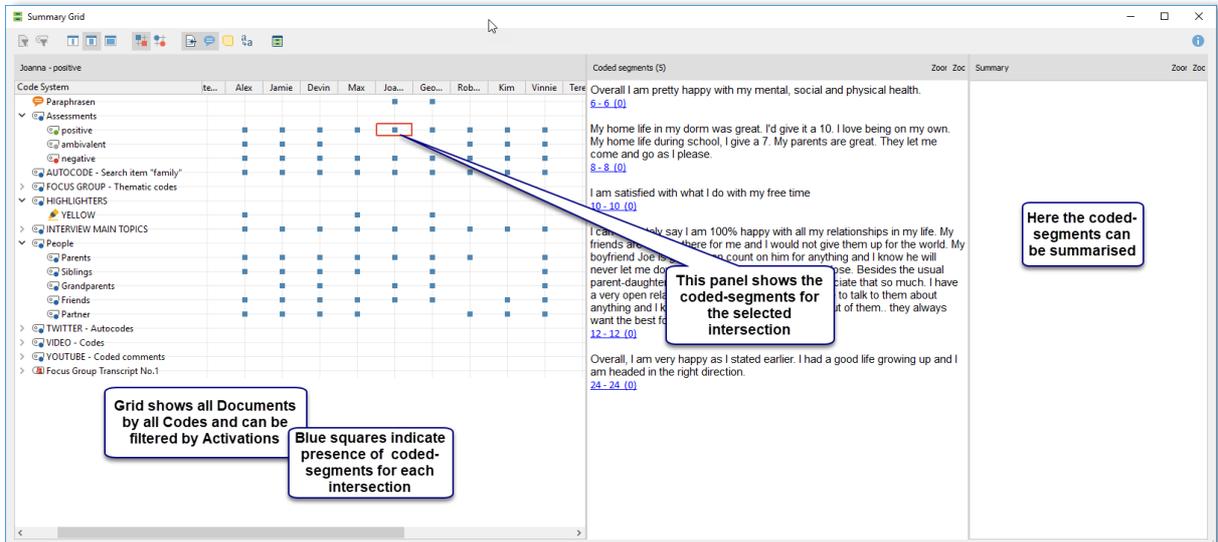
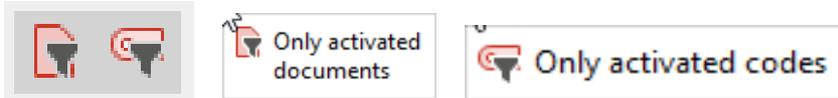


Figure 1. Summary Grid displaying all Documents (columns) by all Codes (rows) and the presence of coded segments

If you have selected Documents and/or Codes activated, you can filter the Grid to generate a more focused display using the two icons at the top left of the Summary Grid window.



Intersections for summaries you have written are highlighted green (Figure 2).

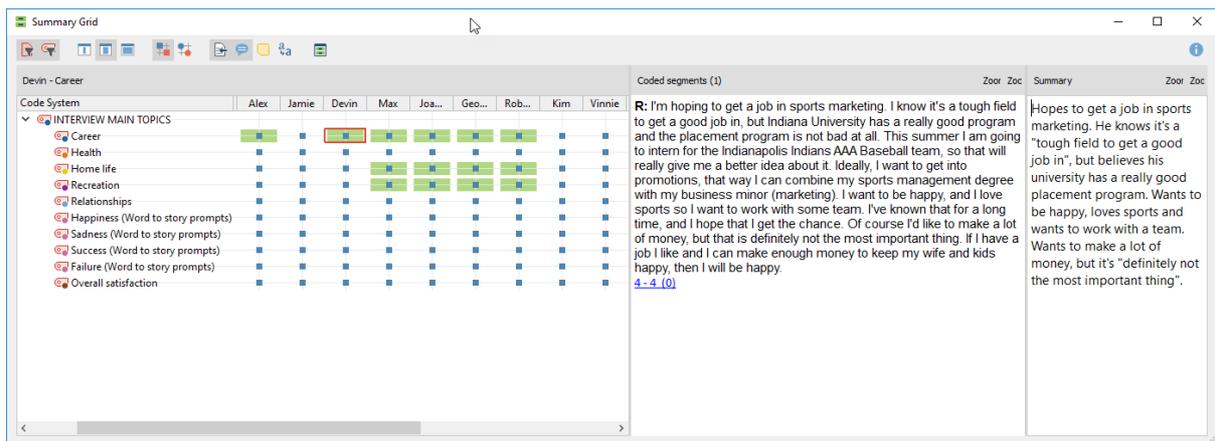


Figure 2. Summary Grid displaying activated Documents (columns) by activated Codes (rows) and the presence of previously written summaries

The coded-segments displayed in the Summary Grid are interactively connected to the underlying data – double-clicking on the blue square displays the whole document in the Document Browser with the coded-segment highlighted (Figure 2).

This is helpful if you want to use surrounding data context and/or other applied codes to inform the writing of summaries.

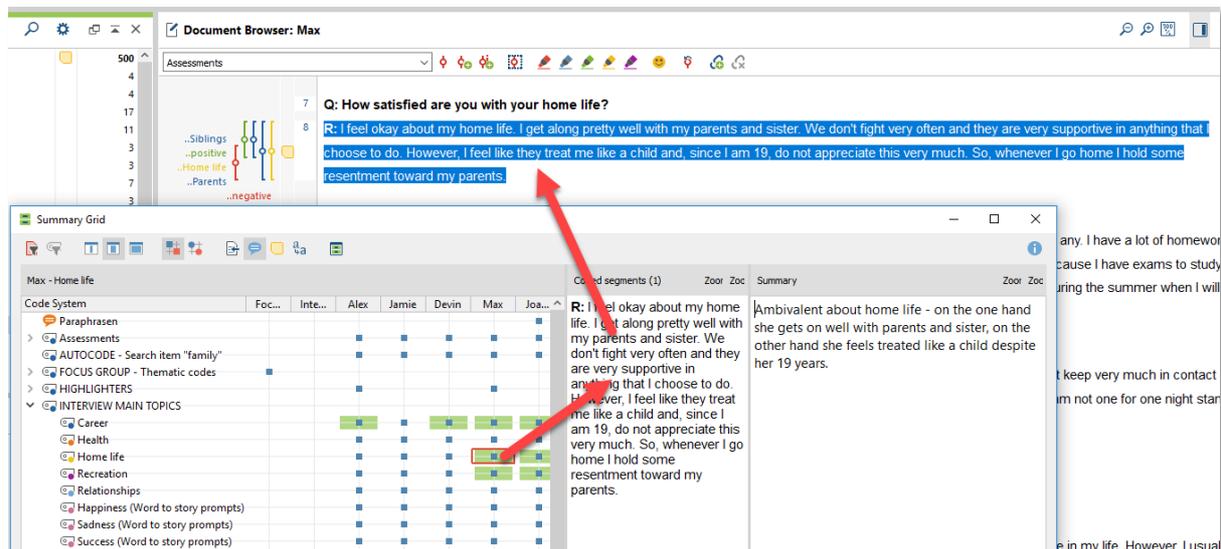


Figure 2. Interactivity between Summary Grid and source Document

Working with Summary Tables

Having written Summaries in the Grid, you can use Summary Tables to display and compare summaries. You build your own Summary Tables (and you can have as many as you need) by selecting the Documents and Codes to display and any relevant Variables (Figure 3.)

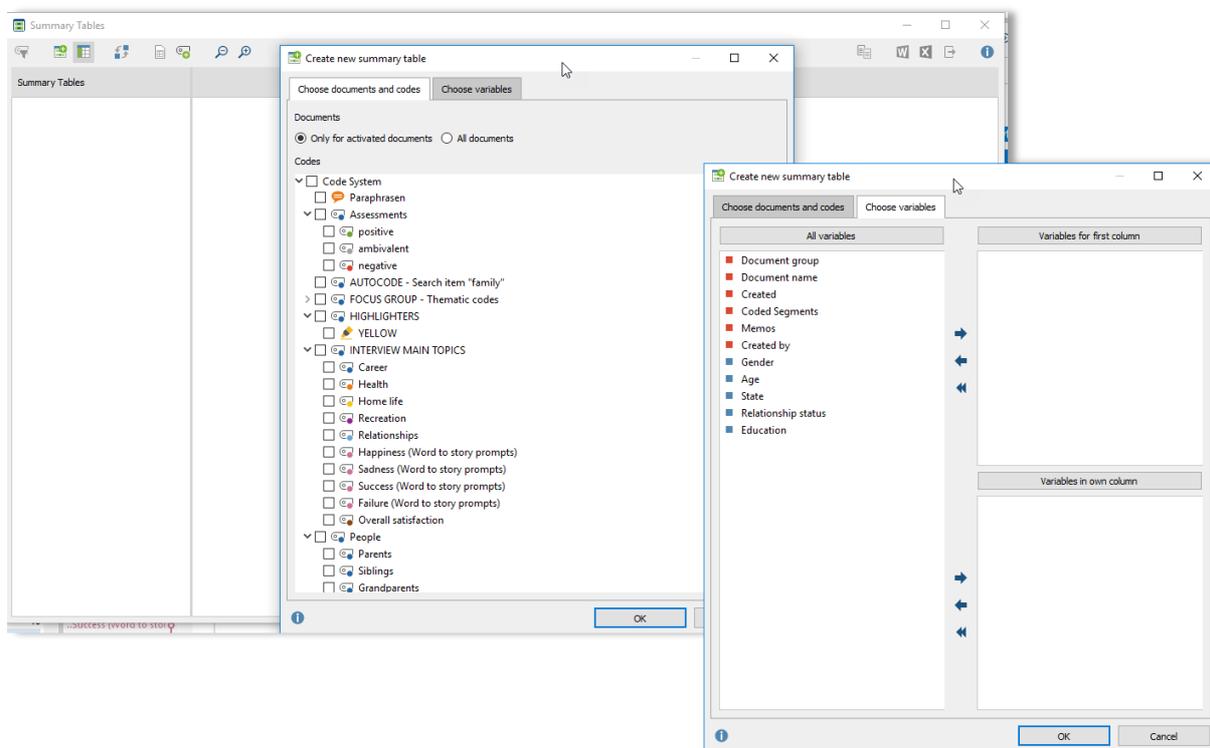


Figure 3. Creating a Summary Table – options for selecting Documents, Codes and Variables

The Summary Table displays the selected Codes (in the columns) by the selected Documents with Variable information (in rows) (Figure 4).

Interview Topics	Documents and variables	Career	Home life	Recreation
5	Interviews Indiana\Devin Gender: male Age: 21 Relationship status: single	Hopes to get a job in sports marketing. He knows it's a "tough field to get a good job in", but believes his university has a really good placement program. Wants to be happy, loves sports and wants to work with a team. Wants to make a lot of money, but it's "definitely not the most important thing".		
6	Interviews New York\Max Gender: female Age: 19 Relationship status: single	Very happy with career because actual major "combines both my business interests and my clothing interests" and offers lots of opportunities for "growth and development". Enjoys the subject matter.	Ambivalent about home life - on the one hand she gets on well with parents and sister, on the other hand she feels treated like a child despite her 19 years.	Due to many homework tasks and studying time, there is great dissatisfaction with the little time available for relaxation.
7	Interviews New York\Joanna Gender: female Age: 21 Relationship status: partnership	Will continue with undergraduate studies to get a BS in nutrition; doesn't look forward to going back to college, but it's the only way she "can achieve a license".	Rated home life in dorm better than home life during school (10 vs. 7). Likes to be independent, which is challenging at home because she only has control over own room.	Satisfied with the leisure activities, but would like more time for herself or friends and would like to be part of a sports team again, but does not have enough time for it.
8	Interviews New York\George Gender: male Age: 18 Relationship status: single	Wants to be a movie director, but "chances are slim", so he "has to reach for a more realistic goal" which is studying psychology.	Views home life as quite good, with good relations to parents and brother. There is a closer relationship with the mother than with the father, but the mother can be a little too caring. The family rarely eats together, so he often goes out to eat with his brother.	Does a lot of sports and other recreational activities. Finds it important to do many different things and likes the competitiveness in sports as well as progression of getting better. Loves to make movies, especially comedy skits with a friend and gets satisfaction out of the reactions of people who watch the skits. Also writes scripts for the movies. Overall very satisfied with

Figure 4. A Summary Table – displaying selected Documents, Codes and Variables

The summaries displayed in the Table are interactively linked to the underlying coded segments (Figure 5).

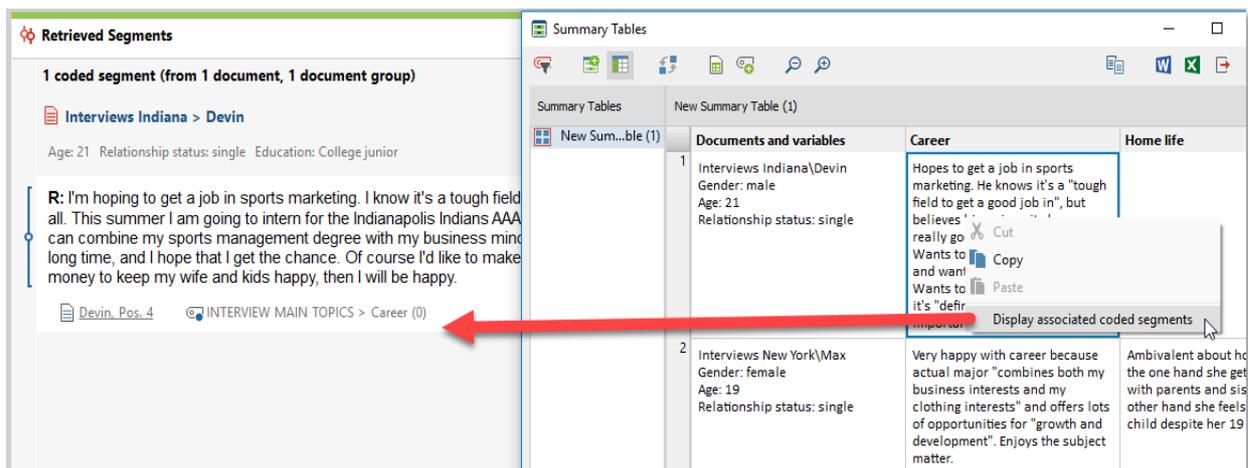


Figure 5. Accessing associated coded segments from Summary Tables

Working with the Summary Explorer

The Summary Explorer allows you to abstract further by comparing the summaries you have written for selected Codes by Documents Groups or Sets as well as by individual Documents (as in Summary Tables). In the example shown in Figure 6, we first created Document Sets using the "Activate by Document Variable" - function (accessed by right-clicking on the top level of the Document System) and then chose those Sets (and four Codes) in the Summary Explorer. Instead of comparing several selected Codes by individual documents (as it is possible in Summary Tables – see Figure 4), the Summary Explorer focuses on one code at a time, by – in this example – the three values of the Variable 'Gender' (female, male, non-binary).

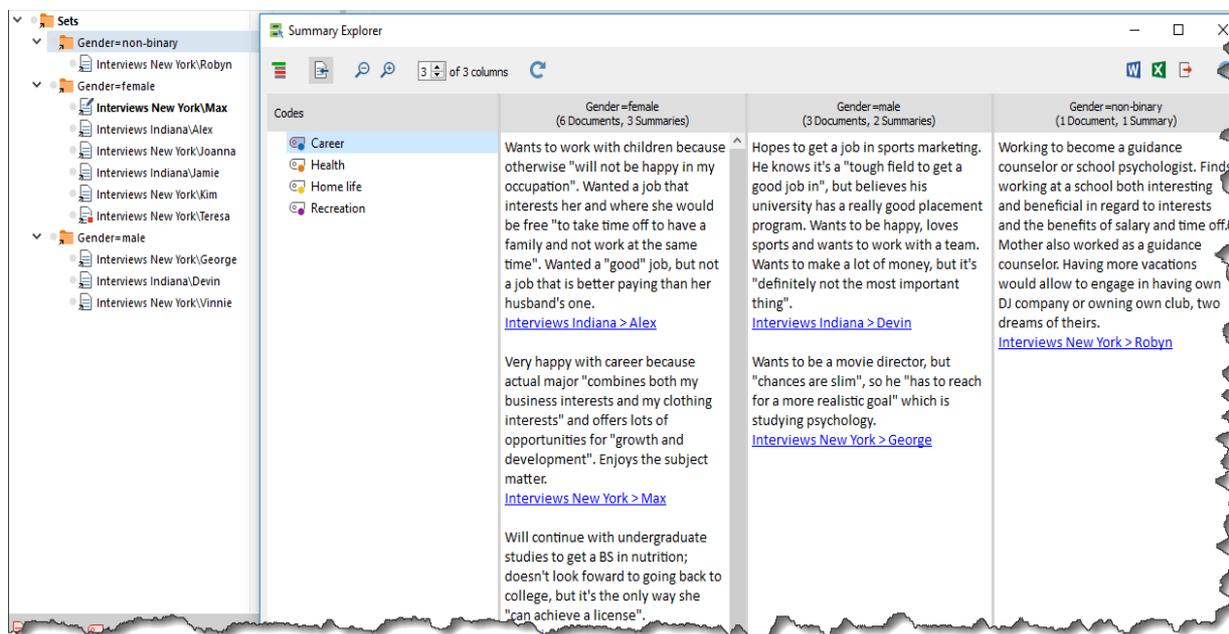


Figure 6. Comparing summaries by Document-Sets in the Summary Explorer

In addition, you can generate Overviews of Summaries from different levels within the Document System – all Documents, Documents within a Group or Set or for an individual Document (Figure 7).

Overview of Summaries

All documents 14 Summaries

Does a lot of sports and other recreational activities. Finds it important to do many different things and likes the competitiveness in sports as well as progression of getting better. Loves to make movies, especially comedy skits with a friend and gets satisfaction out of the reactions of people who watch the skits. Also writes scripts for the movies. Overall very satisfied with recreation, but founds it difficult that he doesn't like going to parties and dancing, and others regard this as uncool.

Document na...	Code	Preview	Locations
George	INTERVIEW MAI...	Wants to be a m...	4 - 4
George	INTERVIEW MAI...	Views home life ...	8 - 8
George	INTERVIEW MAI...	Does a lot of spo...	10 - 10
Joanna	INTERVIEW MAI...	Will continue wit...	4 - 4
Joanna	INTERVIEW MAI...	Rated home life i...	8 - 8
Joanna	INTERVIEW MAI...	Satisfied with th...	10 - 10
Robyn	INTERVIEW MAI...	Working to beco...	4 - 4
Robyn	INTERVIEW MAI...	Pretty happy at ...	8 - 8
Robyn	INTERVIEW MAI...	Relatively satisf...	10 - 10
Max	INTERVIEW MAI...	Very happy with ...	4 - 4
Max	INTERVIEW MAI...	Ambivalent abou...	8 - 8
Max	INTERVIEW MAI...	Due to many ho...	10 - 10
Alex	INTERVIEW MAI...	Wants to work w...	4 - 4
Devin	INTERVIEW MAI...	Hopes to get a j...	4 - 4

Overview of Summaries

Document group: Interviews New York 12 Summaries

Will continue with undergraduate studies to get a BS in nutrition; doesn't look forward to going back to college, but it's the only way she "can achieve a license".

Document na...	Code	Preview	Locations
George	INTERVIEW MAI...	Wants to be a m...	4 - 4
George	INTERVIEW MAI...	Views home life ...	8 - 8
George	INTERVIEW MAI...	Does a lot of spo...	10 - 10
Joanna	INTERVIEW MAI...	Will continue wit...	4 - 4
Joanna	INTERVIEW MAI...	Rated home life i...	8 - 8
Joanna	INTERVIEW MAI...	Satisfied with th...	10 - 10
Robyn	INTERVIEW MAI...	Working to beco...	4 - 4
Robyn	INTERVIEW MAI...	Pretty happy at ...	8 - 8
Robyn	INTERVIEW MAI...	Relatively satisf...	10 - 10
Max	INTERVIEW MAI...	Very happy with ...	4 - 4
Max	INTERVIEW MAI...	Ambivalent abou...	8 - 8
Max	INTERVIEW MAI...	Due to many ho...	10 - 10

Overview of Summaries

Document set: Gender=female 7 Summaries

Wants to work with children because otherwise "will not be happy in my occupation". Wanted a job that interests her and where she would be free "to take time off to have a family and not work at the same time". Wanted a "good" job, but not a job that is better paying than her husband's one.

Document na...	Code	Preview	Locations
Joanna	INTERVIEW MAI...	Will continue wit...	4 - 4
Joanna	INTERVIEW MAI...	Rated home life i...	8 - 8
Joanna	INTERVIEW MAI...	Satisfied with th...	10 - 10
Max	INTERVIEW MAI...	Very happy with ...	4 - 4
Max	INTERVIEW MAI...	Ambivalent abou...	8 - 8
Max	INTERVIEW MAI...	Due to many ho...	10 - 10
Alex	INTERVIEW MAI...	Wants to work w...	4 - 4

Overview of Summaries

Document: Interviews New York\Joanna 3 Summaries

Rated home life in dorm better than home life during school (10 vs. 7). Likes to be independent, which is challenging at home because she only has control over own room.

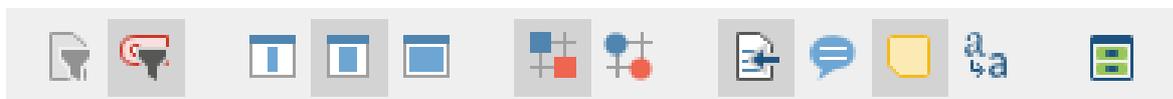
Document na...	Code	Preview	Locations
Joanna	INTERVIEW MAI...	Will continue wit...	4 - 4
Joanna	INTERVIEW MAI...	Rated home life i...	8 - 8
Joanna	INTERVIEW MAI...	Satisfied with th...	10 - 10

Figure 7. Summary Overviews across all Documents, by Document Group, Document Set and an individual Document

Display options, outputting Summaries and integrating them with other aspects of your work in MAXQDA

It is worth exploring the short-cut icons at the top of the Summary Grid, Table, Explorer and Overview windows, as there are several options for varying the display, outputting and integrating other aspects of your work.

Shortcut icons at the top of the Summary Grid window



Starting from the left:

- the first two icons will toggle whether you are focusing on activated Documents or Codes and change the Summary Grid accordingly.
- the next three icons vary the width and information of column headers.
- the next two icons let you decide whether to display squares or circles in the intersections of the Grid
- the next icon toggles whether the origin of the coded segment is displayed within the Grid
- the next icon toggles whether any comments that are associated with the coded segments are displayed in the Grid
- the next icon toggles whether any memos that are associated with the coded segments are displayed in the Grid
- the next icon will standardise the fonts used within the Grid
- the final icon, on the far right, will open the Summary Table feature

Shortcut icons at the top of the Summary Table window



Starting from the left:

- the first icon toggles whether you are focusing on activated or all Codes and change the Summary Table accordingly.
- the next icon allows you to create a new Summary Table
- the next icon toggles whether the Variable names or just the value names are displayed in the first column of the Summary Table
- the next icon transposes the columns and rows
- the next icon will create a new Table Document in the Document Explorer containing the Summary Table – allowing you to e.g. code your summaries

- the next icon allows you to create a new code from within the Summary Table, which appears as a new column (and in the Code System)
- the next two icons allow you to zoom the text displayed in the Summary Tables in (bigger) or out (smaller)
- the final four icons on the top right of the window provide different ways of exporting – copying the Summary Table to the clipboard (to paste elsewhere), exporting into a MS Word File, exporting into a MS Excel file, or exporting in a different file format.

Shortcut icons at the top of the Summary Explorer window



Starting from the left:

- the first icon toggles whether the codes displayed are visualised in their Code System hierarchies or not
- the next icon toggles whether the origin of the coded segment that each Summary represents is displayed within the Explorer
- the next icon allows you to filter on or off the columns displayed in the Explorer
- the next icon reopens the Explorer set-up window allowing you to change what you are viewing
- the final icons on the top right of the window provide different ways of exporting – exporting into a MS Word File, exporting into a MS Excel file, or exporting in a different file format.

Shortcut icons at the top of the Summary Overview window



Starting from the left:

- the first two icons will toggle whether you are focusing on activated Documents or Codes and change the Summary Overview accordingly.
- the next two icons allow you to switch column filters on or off – these are set by right clicking on a column header
- the next icon hides or reveals the search toolbar within the Overview Table
- the final icons on the top right of the window provide different ways of exporting – exporting into a MS Excel file, exporting into an html file or exporting in a different file format.